

ACTION REQUIRED if you have a new SUNY campus employer

IMPORTANT: This guide is designed to assist if you have changed campuses, or are now employed at an additional campus, and you have accounts in the **Optional Retirement Program (ORP) and/or SUNY Voluntary Savings Plan (VSP)** [formerly named Tax Deferred Account (TDA) / Supplemental Savings Account (SRA)].

It is required to register your account(s) under your new campus location. Failure to do so, may result in:

- *duplicate contributions in the same pay period*
- *outdated employment records*
- *missed contributions*
- *potential cancellation of your ongoing contributions*

Please click on the appropriate link below for instructions specific to your situation.

- Optional Retirement Program only: Select **ENROLL NOW**. [<click here>](#)
- Optional Retirement Program and Voluntary Savings Plan: **Select ENROLL NOW** [<click here>](#)
- Voluntary Savings Plan only: **Select ENROLL IN VSP** [<click here>](#)
- Employed at more than one campus? [<click here>](#)

Resource: Enrollment Guide

[http://www.tiaa.org/public/pdf/SUNY MVC TDA Guide Enrollment Guide.pdf](http://www.tiaa.org/public/pdf/SUNY_MVC_TDA_Guide_Enrollment_Guide.pdf)

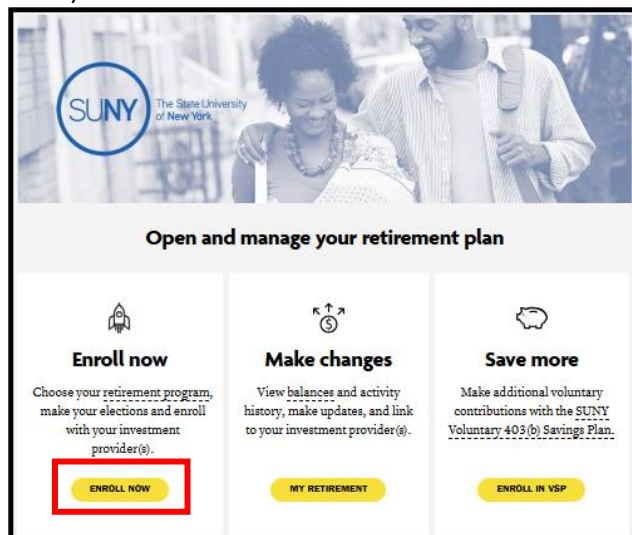
Note: This guide assumes you already have a User ID and Password established for Retirement@Work. If you do not, please start with the “REGISTER” process or call the number at the top right for assistance.

ORP Only:

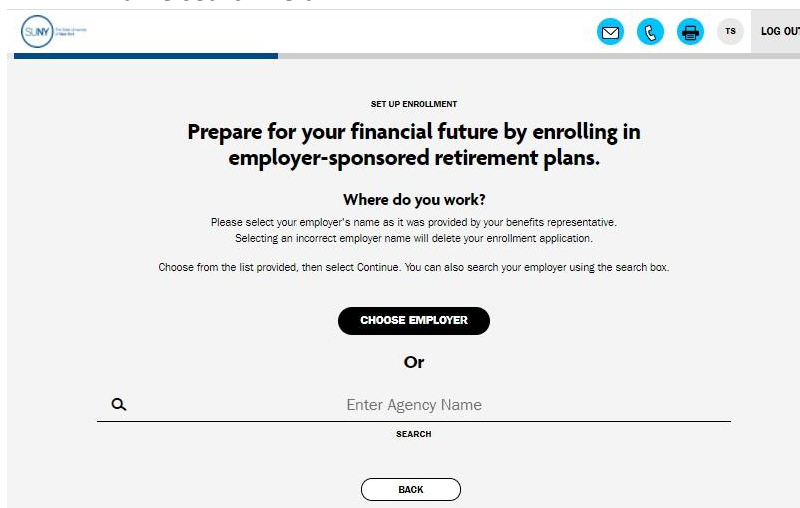
- 1) Log in with your existing User ID and password:



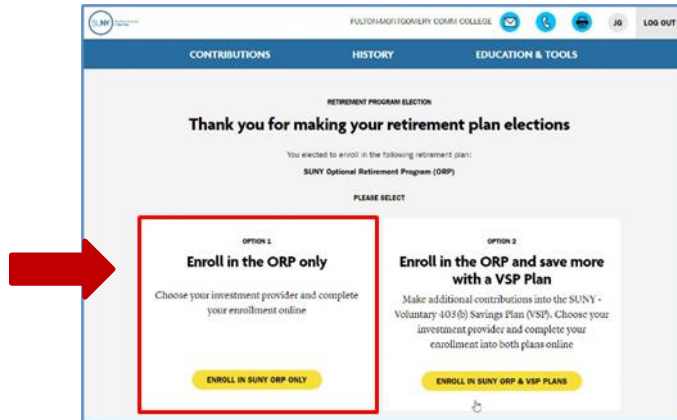
- 2) Click "ENROLL NOW"



- 3) Select your new campus with "Choose Employer" or by typing the campus name in the Agency Name search field:



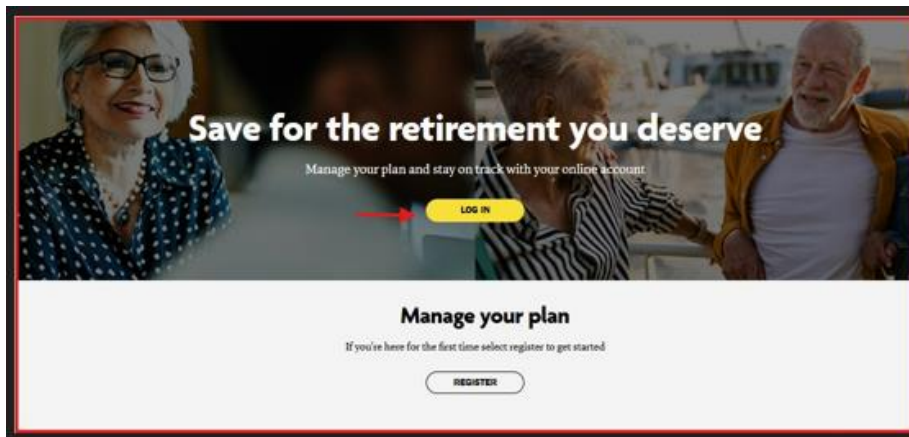
- 4) Select the **SUNY Optional Retirement Program** from the retirement program list and **complete the Retirement Plan Election questions, as if you were enrolling as a new employee.** **NOTE:** You should list your previous campus as former employer to ensure breaks in service are noted, if applicable, and/or escrow is managed correctly upon starting at your new campus.
- 5) Next screen: Two options are available; please select **Enroll in SUNY ORP Only** and follow prompts.



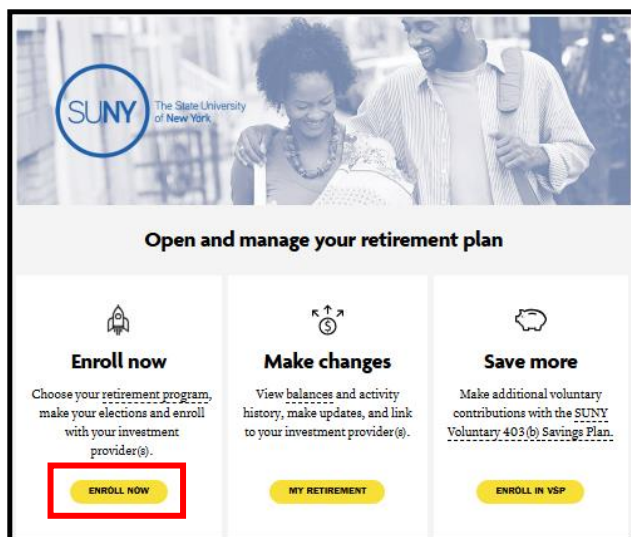
- 6) **Investment Provider selection:**
 - a. If you are changing investment providers, or adding a new one, you must complete both the new/updated selection process and **open** a new account with each newly selected investment provider.
 - b. If you are keeping the same investment provider, select them again; there is no need to re-open accounts there; your contributions will continue going to the that provider, and into your account as with your previous campus.

ORP and VSP Re-enrollment:

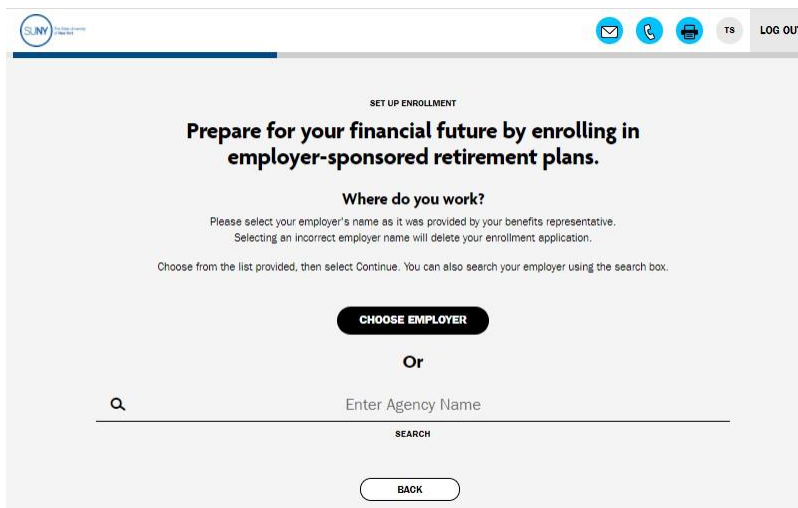
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- 4) Select the **SUNY Optional Retirement Program** from the retirement program list and **complete the Retirement Plan Election questions**, as if you were enrolling as a new employee. **NOTE:** You should list your previous campus as former employer to ensure breaks in service are noted, if applicable, and/or escrow is managed correctly upon starting at your new campus.
- 5) Next screen: Two options are available; please select **Enroll in SUNY ORP and VSP Plans**, and follow prompts

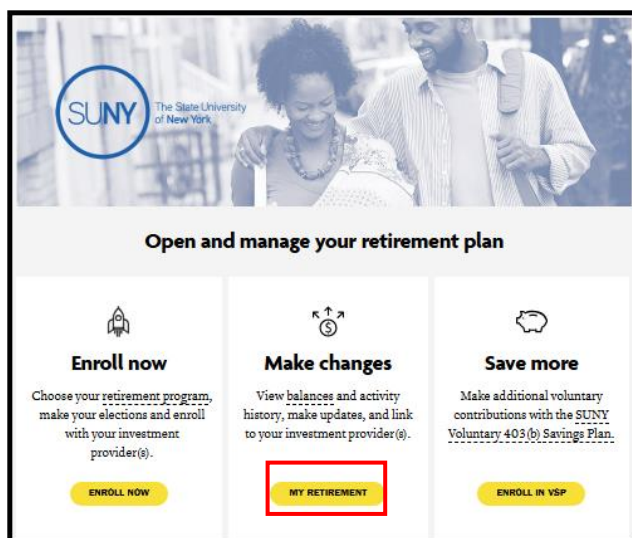
The screenshot shows a web interface for the SUNY Retirement Program Election. At the top, there's a navigation bar with 'CONTRIBUTIONS', 'HISTORY', and 'EDUCATION & TOOLS'. Below this, the main heading is 'Thank you for making your retirement plan elections'. It states 'You elected to enroll in the following retirement plan: SUNY Optional Retirement Program (ORP)'. Under 'PLEASE SELECT', there are two options. Option 1 is 'Enroll in the ORP only' with a yellow button 'ENROLL IN SUNY ORP ONLY'. Option 2 is 'Enroll in the ORP and save more with a VSP Plan' with a yellow button 'ENROLL IN SUNY ORP & VSP PLANS'. A red box highlights Option 2, and a red arrow points to it.

- 6) VSP Salary Deferral: Select the amount of pre-tax and/or Roth dollars for your voluntary contributions.
- 7) If you would like both your ORP and VSP Contributions to go to the same provider, please select “YES” for this option and enter 100% for your provider of choice.
- 8) If you would like your contributions split between/among providers, select “NO” and proceed to follow the prompts indicating percentages and investment providers.
- 9) **Investment Provider selection:**
 - a. If you are changing investment providers, or adding a new one, you must complete both the new/updated selection process and **open** a new account with each newly selected investment provider.
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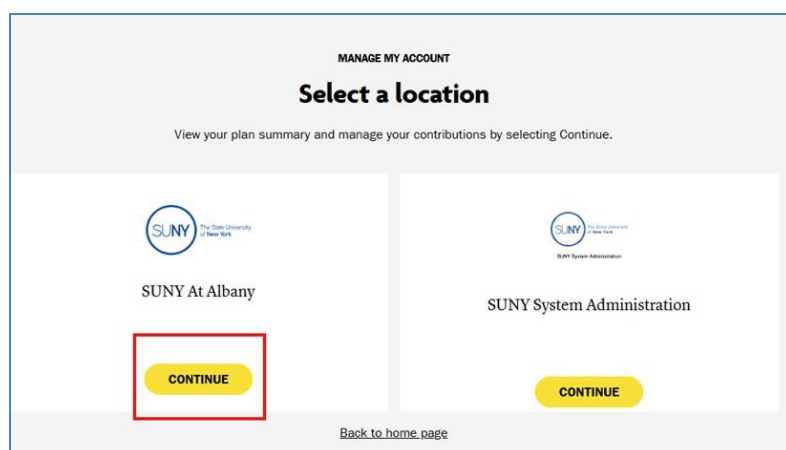
IMPORTANT!!!

TO PREVENT YOUR VOLUNTARY CONTRIBUTIONS BEING DUPLICATED, YOU MUST ZERO THEM OUT AT YOUR FORMER CAMPUS.

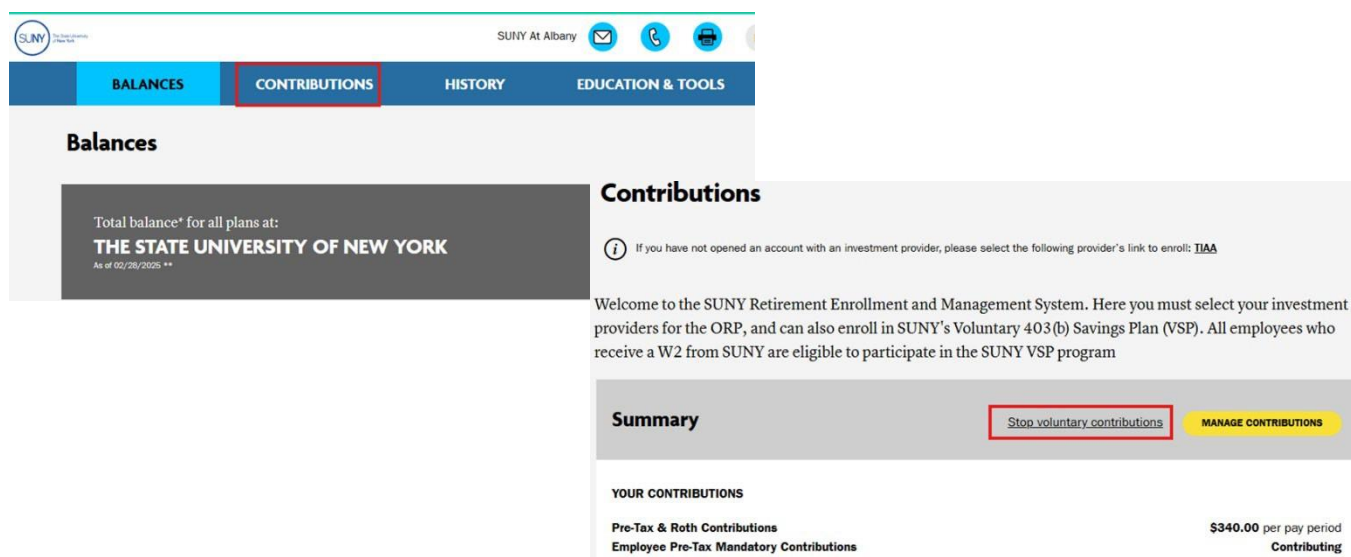
Now that you have set up your new campus, return to the home page and click the center option, MY RETIREMENT, to make changes:



Select your **FORMER CAMPUS** from the options shown:
For example:

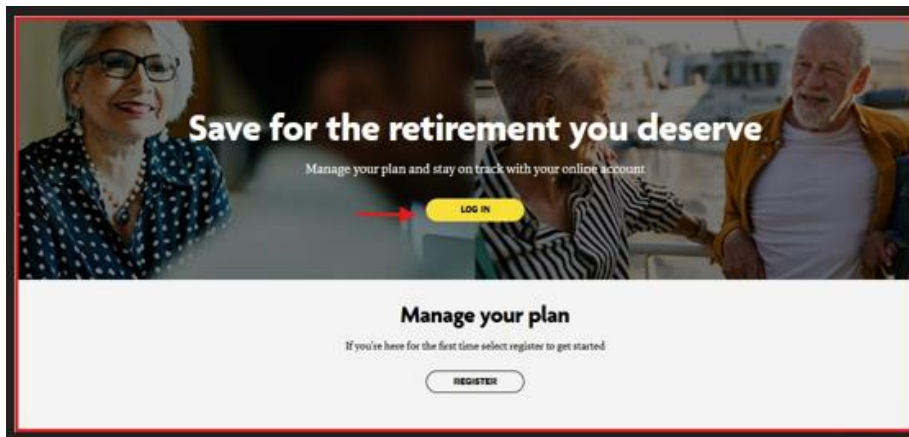


As shown below, select the CONTRIBUTIONS tab at the top of the screen. Next, click “Stop Voluntary Contributions” to the right of the SUMMARY heading, then follow the prompts to stop the previous campus deferral:

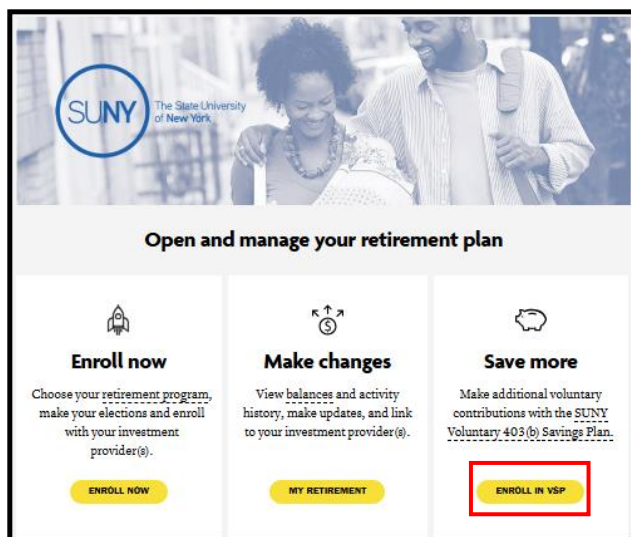


VSP Only:

- 1) Log In with your existing User ID and Password:



- 2) Click "ENROLL IN VSP"



- 3) Select your new campus with "Choose Employer" or by typing the campus name in the Agency Name search field:

A screenshot of the SUNY retirement plan website showing the "SET UP ENROLLMENT" section. The heading is "Prepare for your financial future by enrolling in employer-sponsored retirement plans." Below this is the question "Where do you work?" followed by instructions: "Please select your employer's name as it was provided by your benefits representative. Selecting an incorrect employer name will delete your enrollment application." and "Choose from the list provided, then select Continue. You can also search your employer using the search box." There are two main options: "CHOOSE EMPLOYER" and "Or". Below "Or" is a search field with a magnifying glass icon and the text "Enter Agency Name". Below the search field is a "SEARCH" button. At the bottom is a "BACK" button.

4) The next page should be the CONTRIBUTIONS page; click “MANAGE CONTRIBUTIONS.”

CONTRIBUTIONS HISTORY EDUCATION & TOOLS

Contributions

i You are now eligible to contribute to the following employer-sponsored plan:

- SUNY - VOLUNTARY 403(b) SAVINGS PLAN (VSP)

i If you have not opened an account with an investment provider, please select the following provider's link to enroll: [Corebridge Financial](#), [Fidelity](#), [TIAA](#), [Voya Financial](#)

Welcome to the SUNY Retirement Enrollment and Management System. Here you must select your investment providers for the ORP and can also enroll in SUNY's Voluntary 403(b) Savings Plan (VSP). All employees who receive a W2 from SUNY are eligible to participate in the SUNY VSP program.

i Your employer is reviewing your SUNY Optional Retirement Program elections. Your contributions will start after your elections are approved by your employer. In the event that your election is declined, you will get an email communication.

Summary **MANAGE CONTRIBUTIONS**

5) Select the amount of pre-tax and/or Roth and follow the prompts to select your investment provider.

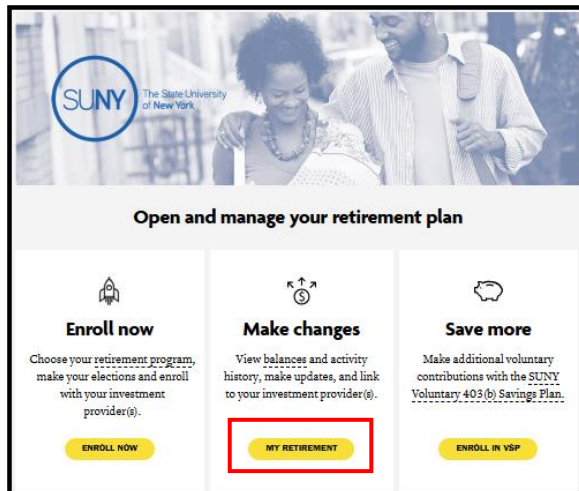
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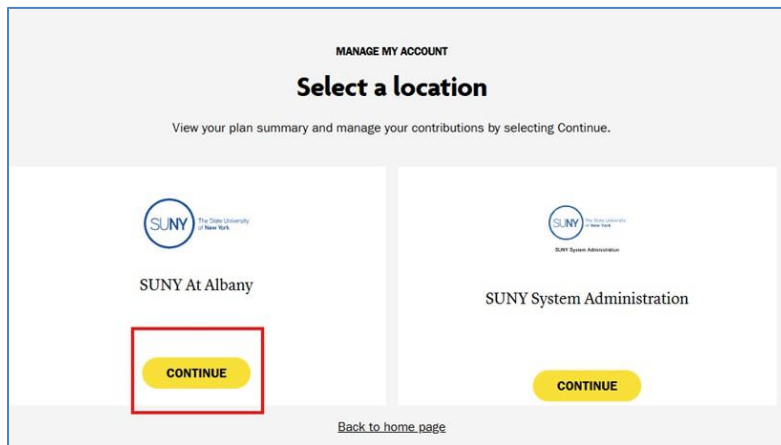
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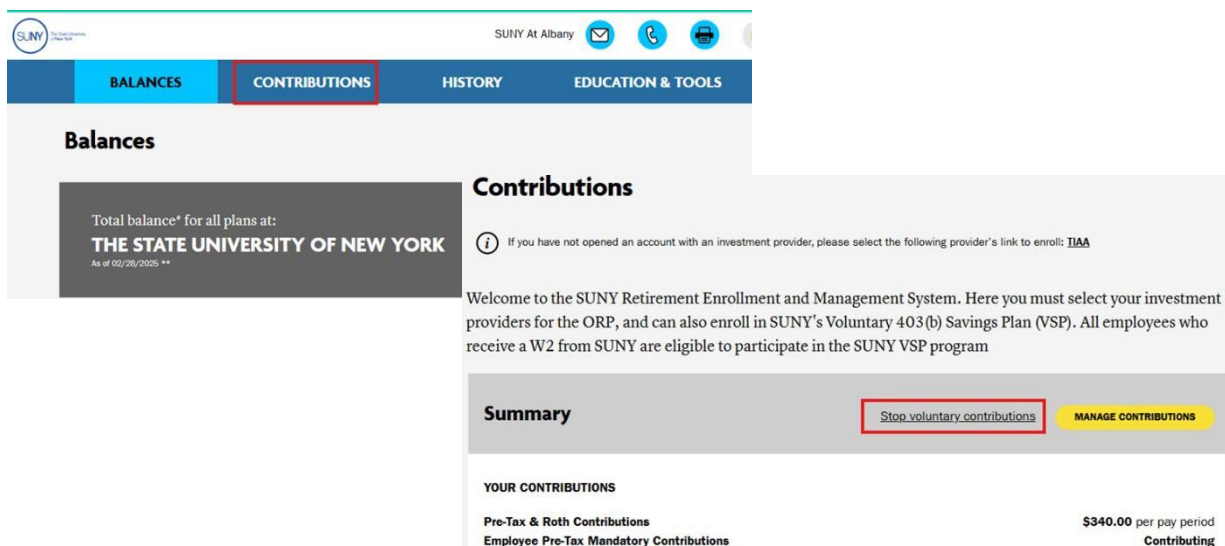
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Employed at more than one campus?

This is a rare circumstance; however, it can happen, and we want you to be prepared!

SUNY 4-year State Campuses: Payroll is centralized with the NYS OSC, so this does not apply to you.

SUNY 2-Year Community College Employees:

If you are employed at more than one campus, you will need to enter a Retirement Plan Election form for each campus employer so that payroll is set up correctly for you. Please follow the “ORP ONLY” instructions for each campus.

If you would like voluntary contributions to be deducted from each campus’ paycheck, you must enroll in the VSP for each campus. Please repeat the Save More process for enrolling in the VSP for each campus. You can cancel one or more campus deduction at any time by following the instructions in this guide (see pages 5 and 8 for assistance).